Traffic trends among UIC member companies in 2021

Provisional results


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Monthly data for 2019, 2020 and 2021 provided by passenger and freight operators, all members of UIC, shows that the improvement in rail transport conditions continues but still slowly, especially for passenger transport for which traffic has not yet returned to 2019 levels (Figure 1). For freight traffic, after a marked decrease in 2020 in Europe and the United States, the trend is positive but weak in 2021, while growth is gradual and more sustained over the three years for some major Asian and African companies (Figure 2).

Figure 1. Passenger-kilometres (millions) for 2019 (white bar), 2020 (grey bar) and 2021 (black bar). The y axis is a logarithmic scale. Railway companies are grouped by region, with values in percentage showing the average change between 2020 and 2021. Please note that not all railways took part in the survey. The overview of the railway market presented here is thus a partial one.

Rail passenger traffic (passenger-kilometres, Figure 3) has shown a general recovery since the beginning of 2021. Indeed, after an increase over June to August 2020 and then a slowdown during the last quarter 2020, traffic is on the rise again for the majority of companies. Thus in 2021, 33 companies (out of 44)
showed a recovery in traffic compared to 2020, examples being CR (China, +17%), IR (India, +10%), SNCF (France, +34%), RENFE (Spain, +41%), AMTRAK (USA, +62%) and +89% on average for African companies, which had recorded a very strong slowdown in 2020 traffic. Unfortunately, for some passenger operators (i.e. 11 out of 44), traffic was lower during 2021 than 2020, especially for East Japan Railways at -6%, companies in Chinese Taipei (i.e. Taiwan) with an average of -24%, for DSVN (Vietnam, -60%), KTM (Malaysia, -55%) and DB-AG (Germany, -3%). In Southeast Asia and Japan, the impact of the pandemic on passenger traffic was stronger in 2021 than in 2020, contrary to the rest of the world.

The monthly data for transport of goods by rail (Figure 3) shows that, on average, traffic was negatively impacted during the first half of 2020 and that there was then a more or less rapid recovery, depending on the company. For some companies, the impact was insignificant leading to steady growth over the three years. Indeed, it is noted that some African companies, such as SNCC (Democratic Republic of Congo), SNTF (Algeria) and SETRAG (Gabon) have recorded regular growth resulting in a difference ranging from +20 to +40% between 2019 and 2021 (see Figure 2). The same trends are also found for some Asian companies such as DSVN (Vietnam, +12% between 2019 and 2021), KTZ (Kazakhstan, +4%), Indian Railways (+14%) and China Railways (+5%).

In Europe, results are contrasted with, for example, TCDD (Turkey, 2021 vs 2019 = +10%), SBB (Switzerland, +5%), SNCF (France, +11%), VR (Finland, +2) and ZSSK Cargo (Slovakia, +5) which show higher freight traffic in 2021 than in 2019. For most member companies based in the EU-27, traffic was better in 2021 than in 2020 but has not yet reached 2019 levels, this is the case for DB-AG (Germany), PKP (Poland), FSI (Italy)
and LG (Lithuania) for example. The same trend is shown for goods transport in the US, with better results in 2021 compared to 2020 but not as high as in 2019.

Figure 3. The left-hand graph shows the monthly passenger traffic index for the period from January 2019 to December 2021. The reference for the index is January 2019, equal to 100. Aggregates of UIC railway members for which data is available are represented by region: “EU-27”, “Other Europe” and “N-America” plus Russian Railways (RZD), China Railways (CR), Indian Railways (IR) and East Japan Railways (EJR). The list of railways included in the “EU-27”, “Other Europe” and “N-America” aggregates is shown in Figure 1. The right-hand graph shows the same data but for freight traffic. Aggregates of UIC railway members for which data is available are represented by region: “EU-27” and “Other Europe” (see Figure 2 for the list of railways), plus Russian Railways (RZD), China Railways (CR), Indian Railways (IR), Kazakhstan Railways (KTZ) and Class 1 companies from the Association of American Railroads in the US. EJR and AAR data was originally provided by quarter and has been adjusted to the month scale in both graphs. Data from Indian Railways has been calculated using monthly passengers/tonnes carried multiplied by the mean distance covered by one passenger/tonne.

Further information is provided in the monthly and quarterly reports on passenger, freight and train traffic, available online via the UIC web application for UIC statistics correspondents:

https://stats.uic.org/login.aspx

or on the Extranet:

https://extranet.uic.org/en/file/251732

Annual data is available from Railisa:

https://uic-stats.uic.org/select/
More information on revenue losses in the EU-27 is published by the Community of European Railway and Infrastructure Companies:


Other information:

AAR: North American freight rail traffic rose in 2021


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